POWER UP

WITH AN AMC, YOUR ASSOCIATION CAN DRIVE GROWTH, LEADERSHIP, AND INNOVATION LIKE YOU’VE NEVER SEEN BEFORE

WHAT’S NEXT: MAKE THE MOST OF AMCS’ KNOW-HOW 3

AMCS: WHERE THE NEXT-GEN WORKFORCE IS LEARNING TODAY 6

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OUR MISSION:
YOUR MISSION

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Preparing for What’s Next
An AMC allows an association to be agile and flexible—and makes its path toward a brighter future easier to navigate.

By Allison Torres Burtka

Staffing the Workplace of the Future
As baby boomers retire and millennials and Gen Z step in, AMCs are helping to train the next generation of association professionals.

By Christine Umbrell

Bringing Great Ideas to Life
Working with an AMC—and its team of subject-matter experts—can make for a more successful new-program implementation.

By Christine Umbrell
PREPARING FOR WHAT’S NEXT

An AMC allows an association to be agile and flexible—and makes its path toward a brighter future easier to navigate.

By Allison Torres Burtka
AMCs help associations figure out what they should change and how to go about it. They offer experience and expertise that would be difficult for any single association to replicate alone.

An AMC “has its own internal think tank, where we are able to benchmark and conduct general data collection across all of our groups, to look at trends” and what possibilities those trends offer to associations, says Marilyn Jansen, executive director of business development at Association Management Center.

The company works with 31 member associations and draws from experience with all of them, Jansen says. The AMC also houses a wealth of knowledge—experts on operations, membership, marketing, advocacy, technology, and education, for example—under one roof.

In that setting, “you have a lot of experience, brain power, and innovation,” she says.

“AMCs are in some ways the ultimate shared economy,” says Susan Iris, partner at Navigate Strategies. AMCs offer “flexibility and scalability along with innovation, so they can really create turnkey solutions for associations—as they need them—and help associations assess which ones will be the most effective,” she says.

The business acumen AMCs bring to the table “allows the business of the association to operate at peak efficiency,” Iris says.

As part of the process, Jansen says, “business analysts and innovation specialists look carefully at the organization to determine: What kind of business process do we need to have in place? And then what sort of technology solution would couple with that?”

**WHAT MEMBERS WANT**

One common challenge for associations is the evolving membership model. It used to be that “there was one game in town, and that was the association,” Jansen says. Now, people have more resources at their disposal, and “they’re not as inclined to think, ‘I have to join XYZ association and become a member to get this information.’” AMCs help associations assess which products and services will better engage members.

“Ten to 20 years ago, it was easy to send out renewals, and people would pay because they wanted to belong to an organization, and there were less questions asked,” says David Casalod, CEO of Status Plus. “Now, every single member says, ‘OK, what’s in it for me? What can I get out of the association?’”

People are looking for opportunities to advance their careers through education, training, and networking—and these demands have “fundamentally changed how associations are responsive to the needs of members,” says Iris. Traditional revenue streams are rapidly evolving to include community engagement, online and on-demand learning, and access to industry expertise and best practices.

Casalod says his AMC noticed that members were using fewer of their available membership benefits. So, for one of its association clients, it implemented a lower base fee, allowing members to build their own membership based on what they want—such as journal subscriptions, free or reduced-fee access to online platforms, and webinars.

“For us, the challenge is to guide that process and find the right tools to implement the changing membership structure as it becomes more dynamic,” he says.

**SCALABILITY**

AMCs can scale their resources—including time, money, and talent—to respond to associations’ changing needs. “It’s hard for a single association to move with the same fluidity that AMCs can,” Iris says.

This scalability may include an association’s international expansion. Casalod says Status Plus manages several international organizations and has helped focus their efforts on a country or a region as they expand—including understanding local cultures, what structures already exist in other countries, and what links or networks can be created.
BIG THINKING
Overall, AMCs allow associations to think big and long-term. Doing so can help associations “make sure they are not only relevant to members, but also important to their success—that they deliver a unique value that members can’t really get anywhere else,” Iris says.

Many associations are starting to “look at their future selves with a startup mentality,” Iris says. “If we had to build it tomorrow, what would we look like? Who would be our competitors?” This approach helps associations be proactive and not just reactive.

But change can be scary. “I always approach it with: ‘Change always hurts a little bit,’” Casalod says, but not changing often is riskier than changing.

For an association considering an AMC model, Jansen recommends engaging a consultant who understands the pros and cons of the model. “The AMC model is not a fit for every association, but it can be a perfect fit for a significant number of groups that sometimes don’t even know the model exists,” she says.

Allison Torres Burtka, a longtime association journalist, is a freelance writer and editor in West Bloomfield, Michigan. Email: allison@atburtka.com

“AMCs ARE IN SOME WAYS THE ULTIMATE SHARED ECONOMY”
—SUSAN IRIS, NAVIGATE STRATEGIES
STAFFING THE WORKPLACE OF THE FUTURE

As baby boomers retire and millennials and Gen Z step in, AMCs are helping to train the next generation of association professionals.

By Christine Umbrell
Given record low unemployment rates and the graying of the baby boomer population, today’s associations are being challenged by high workforce turnover and a need to train new staff members in the nuances of association management quickly and efficiently. In this climate, some associations—particularly small and medium-sized organizations—are finding positive results in partnering with AMCs.

Associations with large staffs already have a safety net in place when an employee leaves. They have staff members with institutional knowledge and skill sets to step in and do the work or train a replacement, says Karen Wesloh, CMP, CAE, partner and senior account executive at The Harrington Company. For an association with a smaller staff, however, “losing one person, who may wear many hats, results in a void that can be hard to fill.”

Enter the AMC solution: When an AMC provides staffing for a smaller association, the loss of one employee is less problematic. Because AMCs generally have multiple staff members with specific skill sets working with an association, it is similar to having a large staff—and easier to successfully navigate a staffing transition.

Training Gen Z
By 2020, Gen Z workers are expected to comprise 36 percent of the global workforce, according to CNBC. Fortunately, many AMCs already have comprehensive training programs to bring new employees up to speed.

Young association professionals who advance within an AMC get a more comprehensive training experience than is readily available at standalone associations, says Janel Fick, owner/partner of Global Management Partners (GMP). “We are very selective in the hiring process to ensure our staff is a fit with both the AMC and our client association cultures,” she says. “We work hard to find new talent, identify rising stars, and educate them and make sure they’re able to adapt to the changing needs of their client and the AMC.”

GMP and other AMCs invest significant resources in education and mentorship so new employees are immersed in the association management culture from day one. And most AMCs encourage employees to participate in industry seminars and meetings, so they are current with the latest trends and technologies, says Bill Pawlucy, MPA, IOM, CAE, president of Association Options, a consulting firm that assists associations in assessing their needs and identifying the best-fit structure. This approach allows for continuity and experience when an association turns to an AMC to staff up.

This ongoing educational approach also spurs innovation during times of change. Staff transitions can present an opportunity for the entire team to re-evaluate the organization’s governance, structure, and programming and consider testing new technologies or services—incorporating fresh perspectives and expertise from the entire AMC staff.

“The clients benefit not only from their dedicated team members but also from the entire AMC team who are available for idea sharing and problem solving,” Fick says.

Choosing Hybrid Models
No two associations are alike, so each one will benefit from a unique staffing structure tailored to its needs. AMCs can provide some or all of the solutions to ensure top performers are carrying out an association’s mission in a climate of high workforce turnover. In fact, many associations choose to outsource some responsibilities to an AMC, while keeping other duties in-house. “With a hybrid model, you can add services [from the AMC] as needed—for example, adding a quarter-time staff member” instead of one full-time employee at a time, explains Pawlucy.

Associations may find it particularly helpful to work with an AMC during periods of contraction or growth. “AMCs can scale up or down as needed,” he says.

Pawlucy has found that many organizations outsource functions such as meetings, back-office management, and marketing. Most AMCs run dozens of meetings a year, so their staffing professionals are experts in best practices and have solidified relationships with vendors, allowing them to negotiate with hotel chains and conference centers to seek

AMCs can provide some or all of the solutions to ensure top performers are carrying out an association’s mission in a climate of high workforce turnover.
optimal pricing. “The leverage that an AMC has in contracting with vendors can be useful,” Pawlucy explains.

And hiring AMC database and accounting staff to manage an association’s AMS system can be advantageous, adds Pawlucy, since the AMC employees likely have developed expertise by working on similar accounts and with similar systems.

**TAKING THE LEAP**

Moving one step beyond a hybrid model, some small associations with captive staffs consider transitioning to AMCs when a lead staff person retires, says Wesloh. Making such a change can be intimidating, but AMCs have procedures in place to ease the process.

Many AMCs try to retain staff from standalones during transitions, according to Wesloh. Former standalone association employees may enjoy becoming part of the AMC team and appreciate the additional support network. They also may benefit from internal training opportunities and welcome the social activities that can be part of working at a larger company.

Fick recalls a smooth transition when her company onboarded an association that was previously staffed by a half-time association professional. GMP assumed management and dedicated one and a half staff members to the account. An AMC is able to assign “an entire team of dedicated professionals who are focused on providing personalized and professional services,” she says.

Since the changeover to the AMC, this client has realized a 35 percent growth in membership, a significant increase in annual meeting attendance, elevated sponsorships, and a strong and stable financial portfolio. In addition, now “there are new benefits and communications that add more value and increase engagement with the members,” says Fick.

When top-level staffing changes occur at an association that has already partnered with an AMC, the AMC staff can ease transitions.

Wesloh recalls working closely with an international association when its CEO of many years retired. All of the operations and management duties were the responsibility of The Harrington Company, which made for a seamless transition. Board members “were able to rely on our team members, our strategic marketing expertise, and our executive director to continue carrying out the association’s strategic plan” during the interim, Wesloh says.

The workforce of the future is already here—and it’s young. Now is the time to embrace the energy and enthusiasm of Gen Z in the association workforce. By partnering with AMCs, associations can reap the benefits of comprehensive training programs for young professionals while enjoying the support of a team approach to association management.

**Christine Umbrell** is a freelance writer based in Herndon, Virginia. Email: christineumbrell@gmail.com

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BRINGING GREAT IDEAS TO LIFE

Working with an AMC—and its team of subject-matter experts—can make for a more successful new-program implementation.

By Christine Umbrell
When implementing a new program or service at an association, AMCs often employ a key principle of the Mayo Clinic service model, says Eric Ewald, CAE, vice president of Ewald Consulting. Just as the Mayo Clinic offers a team-based approach, bringing together doctors with wide-ranging expertise in a collaborative approach to patient care, AMCs convene several staff members in different areas of association management to help determine whether and how an association’s great idea can become reality.

The Product Development and Management Association (PDMA) benefited from this approach when it worked with Ewald Consulting on its latest initiative—revamping communications offerings by replacing the association magazine with an online “knowledge hub” that serves as a companion to the association’s print media and offers expanded content. To bring the knowledge hub to life, Ewald scaled up staffing in particular knowledge areas needed for the project.

“They wanted to create a collaborative space around online, real-time, quality content” with dedicated communities complementing the seven subspecialties that make up the PDMA body of knowledge, Ewald says. His firm assigned IT, communications, membership, and graphic design staff to the project, who led discussions to help validate the concept and develop a “go-forward plan,” he says. PDMA debuted a working prototype in May.

The knowledge hub is expected to increase the association’s value proposition to members through expanded content in an easy-to-navigate forum. It also will generate income via online advertising and growth in membership.

“Sometimes you have a window of time with energetic leaders [championing] a new idea,” Ewald says, “and you need to get the right people on it quickly” to capitalize on momentum and bring the project to life.

**ASKING THE EXPERTS**

One great way to take advantage of the wealth of subject-matter expertise at an AMC when an association doesn’t have a big budget is to hire the AMC on a consulting basis to advise on one particular segment of the strategic plan. Bostrom Consulting has embraced this role on several occasions—for example, in helping an association determine whether launching a new credentialing program would add value and was financially feasible.

“Credentialing is a whole different ballgame if you’ve never done it before,” says Jeanne Sheehy, CMO of Bostrom. If, after conducting a pro-con analysis, Sheehy and her team recommend taking the plunge on a project, the AMC can step back and let the association tackle it, or the company may be asked to send in a team of credentialing experts to facilitate the effort.

Bostrom has also helped groups revamp their communications strategies—for example, aiding the American Psychological Association in “assessing its membership department strategy and blowing up its associated communications approach,” Sheehy says. Bostrom brought in its membership experts to interview APA members, reviewed
AMCs convene several staff members in different areas of association management to help determine whether and how an association’s great idea can become reality.

For example, the American Medical Association recently partnered with Bostrom for its 2019 ChangeMedEd conference. AMA sought to improve engagement of adult learners by increasing the number and level of interactive sessions. Bostrom also provided vendor contracting, exhibit sales, and onsite logistics for ChangeMedEd.

“Along with a bench of association resources, including EdDs and experienced meeting managers, we have buying power, and the association saves on internal staffing costs by outsourcing and finding specialized resources it doesn’t have,” Sheehy says.

COSTS AND BENEFITS
AMCs can also bring a fresh perspective to association initiatives. Whereas associations sometimes focus too narrowly on their own membership and industry, “AMCs work with trade groups, professional societies, and foundations in a wide variety of industries and professions—providing a broader base for creativity and innovation,” says Sheehy.

And the costs associated with hiring an AMC or consulting firm to manage part or all of a project can be contained with careful planning or covered with revenue generation, according to Hedrick. When a new idea comes up, “we conduct a discovery call to talk through what the project involves, what the goals are … and what resources they will need,” she says.

For projects that may require a significant investment, “we’ll give the association an A, B, and C version” of how the project can be completed, with different timelines, outcomes, and cost options.

When it comes time for an organization to innovate, partnering with an AMC in an integrated, multispecialty approach may be the perfect solution.

The AMC model, says Ewald, “is nicely suited for smaller organizations that would otherwise find it challenging to have all of those subject-matter experts in the room.”

SUPPORT SOURCE
Some associations are finding that a strategic overhaul of their meetings is a “great idea,” with AMCs serving as an integral resource. “Some meetings departments are trying to scale down by keeping the content and education in-house but outsourcing the logistics and revamping the format” by contracting with an AMC to run the meeting and provide education programming best practices, says Sheehy.

For example, Virtual, Inc., a strategic consulting and professional services company, similarly spearheaded the implementation of a communications-focused “great idea” when it helped one client association embrace the digital age by transforming its traditional paper-based publications offerings to an online strategy.

The organization needed help designing a mobile app, revamping its website to incorporate data analytics, and developing measurable engagement metrics, according to Saima Hedrick, CAE, an account executive at the company. Leveraging the expertise of staff members from various departments, Virtual developed a digital communications plan and launched a new website. Hedrick also helped the association replace a poorly read paper newsletter with an e-newsletter that now boasts 74 percent readership among members.

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The association’s internal assessment of its membership communications, and developed a detailed recommendation regarding how APA should reimagine its strategy. In the end, APA used some of Bostrom’s findings in its reformatted department.

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What changes are you seeing in why associations turn to AMCs for service?

MOLLY ALTON MULLINS
CEO AND CHIEF STRATEGIST
SEVEN12 MANAGEMENT
ANNAPOLIS, MARYLAND

I find boards to be savvier than ever, and they are looking for measurable returns on investment when moving to the AMC model. When prospective clients solicit our services, I am providing more data and analytics than ever before to showcase how we deliver our programs and services. They want to see inbound/outbound marketing returns, membership prospect conversion rates, attendee engagement at conventions, and so forth. As a result, we have increased our investment in technology to ensure we have the tools necessary to deliver the results our clients deserve and expect from us.

BENNETT NAPIER, CAE
PRESIDENT AND CEO
PARTNERS IN ASSOCIATION MANAGEMENT
TALLAHASSEE, FLORIDA

Associations are responding to significant changes affecting their membership, association, and the industry or profession they represent. This is forcing associations to look at how their business and staffing models need to adapt with these changing dynamics. As a result, we are seeing more associations look at the AMC model as a viable option for supporting their mission, vision, and members. We are also seeing an increased interest in having AMCs provide consulting services, such as strategic planning and board orientations, due to their exposure to so many organizations and industries.

CONSTANCE WRIGLEY-THOMAS, CAE
OWNER AND CEO
ESSENTIENT ASSOCIATION MANAGEMENT & EVENTS
BURLINGTON, ONTARIO

As the AMC sector grows in Canada, we are seeing single-employee-managed associations upgrading to AMCs. And well-established associations that have lost their momentum and are at risk of folding are downsizing and aligning themselves with an AMC. Why? AMCs are multidisciplinary and tend to have a broad array of skill sets already on board to meet the strategic and organizational needs of most associations. AMCs enable associations in transition to adapt to the changing market.

G.A. TAYLOR FERNLEY
PRESIDENT AND CEO
FERNLEY & FERNLEY, INC.
PHILADELPHIA

Information is power, and AMCs are now widely recognized as an unlimited source of data that saves time and money. Plus, if we don’t have the answer, we know where to go to get it. These shifts from days gone by are coming from association leaders who are searching for an organization that can be their total solution provider.
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GREATNESS

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# Association Management Company Directory

All listings in this directory are paid listings. Information was provided by each company.

<table>
<thead>
<tr>
<th>Headquarters Location (State or Country)</th>
<th>Number of Full-Time-Equivalent Employees</th>
<th>Number of Certified Association Executives on Staff</th>
<th>Number of Full-Service Clients</th>
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<td>Association Associates, Inc.</td>
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<td>16</td>
<td>5</td>
<td>1992</td>
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<td>Association Development Group, Inc.</td>
<td>NY</td>
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<td>20</td>
<td>1996</td>
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<td>Association Development Services, Inc.</td>
<td>MN</td>
<td>9</td>
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<td>1997</td>
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<td>Association Executives Group, LLC</td>
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<tr>
<td>Association Headquarters, Inc.</td>
<td>NJ</td>
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<td>19</td>
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<td>1978</td>
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<td>Association Innovation and Management, Inc.</td>
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<td>Association Management Center</td>
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<td>11</td>
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<td>Association Management, LTD. (AML)</td>
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<td>Association Services Group</td>
<td>GA</td>
<td>35</td>
<td>17</td>
<td>1996</td>
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All listings in this directory are paid listings. Information was provided by each company.
| ASSOCIATIONS INTERNATIONAL | KY | 150 | 4 | 11 | 1974 | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| AURUM SIGNA MANAGEMENT GROUP | GA | 3 | 2 | 2017 | | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| BASE CONSULTING AND MANAGEMENT INC. | CANADA | 14 | 10 | 1988 | | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| BOSTROM | IL | 50 | 7 | 16 | 1932 | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| BOWER MANAGEMENT SERVICES, LLC | NJ | 4 | 1 | 9 | 2009 | | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| CAPITOL HILL MANAGEMENT SERVICES, INC. | NY | 49 | 6 | 48 | 1981 | | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| CAPTURE MARKETING | IA | 9 | 8 | 2009 | | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| CLEMONS & ASSOCIATES, INC. | MD | 14 | 1 | 12 | 1977 | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| CM SERVICES, INC. | IL | 25 | 1 | 16 | 1977 | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| THE CORE MANAGEMENT COMPANY | CA | 10 | 2 | 9 | 2012 | | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| CUSTOM MANAGEMENT GROUP | VA | 16 | 1 | 6 | 2000 | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| DOLCI MANAGEMENT SERVICES, INC. | NY | 15 | 3 | 5 | 1978 | | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| ELEVANTA | GA | 22 | 6 | 1988 | | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| ESSENTIENT ASSOCIATION MANAGEMENT & EVENTS | CANADA | 7 | 1 | 4 | 2005 | | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| EWALD CONSULTING | MN | 92 | 11 | 43 | 1982 | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| EXECUTIVE DIRECTOR, INC. | WI | 245 | 27 | 30 | 1962 | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| FERNLEY & FERNLEY, INC. | PA | 18 | 2 | 8 | 1886 | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| GRAU & ASSOCIATES, LLC | DC | 4 | 4 | 2013 | | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| THE HARRINGTON COMPANY | MN | 33 | 4 | 21 | 1977 | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| HOLLANDPARLETTE | CA | 30 | 2 | 20 | 1985 | | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● |

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| HEADQUARTERS LOCATION (STATE OR COUNTRY) | NUMBER OF FULL-TIME-EQUIVALENT EMPLOYEES | NUMBER OF CERTIFIED ASSOCIATION EXECUTIVES ON STAFF | YEAR FOUNDED | AMC INSTITUTE CHARTER ACREDITED AMC | AMC INSTITUTE ACCREDITED AMC | HEADQUARTERS LOCATION | NUMBER OF FULL-SERVICE CLIENTS | YEAR FOUNDED | AMC INSTITUTE CHARTER ACREDITED AMC | AMC INSTITUTE ACCREDITED AMC | CLIENT SCOPE | STATE/REGIONAL/LOCAL | STATE/REGIONAL/LOCAL | TRADE ASSOCIATION | PROFESSIONAL SOCIETY | PHILANTHROPIC | OTHER SERVICES OFFERED | MEETING/CONVENTION | PUBLIC RELATIONS | GOVERNMENT RELATIONS/ LOBBYING | MEETING/CONVENTION | MEMBER RELATIONS | PUBLIC RELATIONS | TECHNOLOGY |
|----------------------------------------|------------------------------------------|-------------------------------------------------|-------------|----------------------------------|-----------------------------|--------------------------|------------------------|-----------------|----------------------------------|-----------------------------|----------------|-----------------|------------------|----------------|-----------------|----------------|----------------|----------------|----------------|-----------------|----------------|----------------|----------------|
| IMN SOLUTIONS                          | VA                                       | 23                                              | 1           | 1985                             |                             |                          |                        |                 |                                  |                             |                |                 |                 |                |                 |               |               |               |               |                 |               |                 |               |
| INTERACTIVE MANAGEMENT INC.            | CO                                       | 7                                               | 11          | 1974                             | *                           |                          |                        |                 |                                  |                             |                |                 |                 |                |                 |               |               |               |               |                 |               |                 |               |
| INTEREL                                | DC                                       | 67                                              | 16          | 1985                             | *                           |                          |                        |                 |                                  |                             |                |                 |                 |                |                 |               |               |               |               |                 |               |                 |               |
| J&M BUSINESS SOLUTIONS, LLC            | OH                                       | 8                                               | 9           | 1994                             |                             |                          |                        |                 |                                  |                             |                |                 |                 |                |                 |               |               |               |               |                 |               |                 |               |
| KELLEN                                 | UNITED STATES                           | 375                                             | 40+         | 100                              | 1964                        | *                        |                        |                 |                                  |                             |                |                 |                 |                |                 |               |               |               |               |                 |               |                 |               |
| MANAGEMENT EXCELLENCE, INC.            | OH                                       | 6                                               | 1           | 7                                | 1984                        | *                        |                        |                 |                                  |                             |                |                 |                 |                |                 |               |               |               |               |                 |               |                 |               |
| MCBRIDE & ASSOCIATES, INC.             | NE                                       | 4                                               | 1           | 5                                | 1983                        | *                        |                        |                 |                                  |                             |                |                 |                 |                |                 |               |               |               |               |                 |               |                 |               |
| MCI GROUP/MCI USA                      | USA/SWITZERLAND                          | 2500                                            | 15          | 150                              | 1987                        | *                        |                        |                 |                                  |                             |                |                 |                 |                |                 |               |               |               |               |                 |               |                 |               |
| MCKENNA MANAGEMENT, INC.               | MA                                       | 18                                              | 4           | 23                               | 2003                        | *                        |                        |                 |                                  |                             |                |                 |                 |                |                 |               |               |               |               |                 |               |                 |               |
| MEETING EXPECTATIONS                   | GA                                       | 90                                              | 5           | 16                               | 1992                        | *                        |                        |                 |                                  |                             |                |                 |                 |                |                 |               |               |               |               |                 |               |                 |               |
| METACRED—WHERE THE BEST CREDENTIALS GROW | UNITED STATES                           | 35                                              | 6           | 19                               | 2007                        | *                        |                        |                 |                                  |                             |                |                 |                 |                |                 |               |               |               |               |                 |               |                 |               |
| MSP                                    | MD                                       | 23                                              | 8           | 13                               | 1993                        | *                        |                        |                 |                                  |                             |                |                 |                 |                |                 |               |               |               |               |                 |               |                 |               |
| MULTISERVICE MANAGEMENT COMPANY        | PA                                       | 12                                              | 10          | 1962                             | *                           |                          |                        |                 |                                  |                             |                |                 |                 |                |                 |               |               |               |               |                 |               |                 |               |
| NON-PROFIT HELP                        | VA                                       | 4                                               | 1           | 4                                | 1994                        | *                        |                        |                 |                                  |                             |                |                 |                 |                |                 |               |               |               |               |                 |               |                 |               |
| ORGANIZATION MANAGEMENT GROUP INC.     | VA                                       | 42                                              | 4           | 18                               | 1999                        | *                        |                        |                 |                                  |                             |                |                 |                 |                |                 |               |               |               |               |                 |               |                 |               |
| P & N ASSOCIATION MANAGEMENT           | LA                                       | 11                                              | 2           | 16                               | 1991                        | *                        |                        |                 |                                  |                             |                |                 |                 |                |                 |               |               |               |               |                 |               |                 |               |
| PAI MANAGEMENT CORPORATION             | MD                                       | 10                                              | 3           | 4                                | 1984                        | *                        |                        |                 |                                  |                             |                |                 |                 |                |                 |               |               |               |               |                 |               |                 |               |
| PARAGON EVENTS | ASSOCIATION MANAGEMENT                   | FL                                       | 25                                              |                      | 1989                             | *                        |                        |                 |                                  |                             |                |                 |                 |                |                 |               |               |               |               |                 |               |                 |               |
| PARTNERS IN ASSOCIATION MANAGEMENT     | FL                                       | 42                                              | 5           | 21                               | 1997                        | *                        |                        |                 |                                  |                             |                |                 |                 |                |                 |               |               |               |               |                 |               |                 |               |
| RAYBOURN GROUP INTERNATIONAL            | IN                                       | 27                                              | 12          | 1988                             | *                           |                          |                        |                 |                                  |                             |                |                 |                 |                |                 |               |               |               |               |                 |               |                 |               |
| THE REES GROUP, INC.                   | WI                                       | 20                                              | 1           | 17                               | 1984                        | *                        |                        |                 |                                  |                             |                |                 |                 |                |                 |               |               |               |               |                 |               |                 |               |
| RRR ASSOCIATIONS                       | UNITED STATES                           | 5                                               | 7           | 2008                             | *                           |                          |                        |                 |                                  |                             |                |                 |                 |                |                 |               |               |               |               |                 |               |                 |               |
| S&S MANAGEMENT SERVICES, INC.          | CT                                       | 19                                              | 2           | 25                               | 1980                        | *                        |                        |                 |                                  |                             |                |                 |                 |                |                 |               |               |               |               |                 |               |                 |               |

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|----------------------------------------|------------------------------------------|----------------------------------------------------|--------------------------------|--------------|--------------------------------------|-----------------------------|----------------|----------------|---------|---------------------|-----------|------------------|-------------------|----------------|-----------------------|------------|-------------------------|----------|-----------------|----------------------|------------------------|-------------------|----------------------|-----------------|-----------------|-----------------|----------------|
| SEVEN12 MANAGEMENT                     | MD                                       | 17                                                 | 12                             | 1993         |                                      |                             | •              | •              |        |                    | •         |                  |                   |               |                      |           |                          |          |                |                      |                        |                   |                      |                |                |                |                |
| SMITH MOORE & ASSOCIATES               | CA                                       | 18                                                 | 1                              | 2006         |                                      |                             | •              | •              |        |                    | •         |                  |                   |               |                      |           |                          |          |                |                      |                        |                   |                      |                |                |                |                |
| SMITHBUCKLIN                           | IL                                       | 700                                                | 18                             | 86           | 1949                                 |                             | •              | •              | •      | •                  | •         |                  |                   |               |                      |           |                          |          |                |                      |                        |                   |                      |                |                |                |                |
| STATUS PLUS, LLC                       | MN                                       | 17                                                 | 12                             | 1992         |                                      |                             | •              | •              |        |                    | •         |                  |                   |               |                      |           |                          |          |                |                      |                        |                   |                      |                |                |                |                |
| STRINGFELLOW MANAGEMENT GROUP, INC.    | MD                                       | 41                                                 | 6                              | 23           | 2012                                 |                             | •              | •              |        |                    | •         |                  |                   |               |                      |           |                          |          |                |                      |                        |                   |                      |                |                |                |                |
| TALLEY MANAGEMENT GROUP, INC.          | NJ                                       | 45                                                 | 7                              | 22           | 1987                                 |                             | •              | •              | •      | •                  | •         |                  |                   |               |                      |           |                          |          |                |                      |                        |                   |                      |                |                |                |                |
| THOMAS ASSOCIATES, INC.                | OH                                       | 26                                                 | 22                             | 1913         |                                      |                             | •              | •              |        |                    | •         |                  |                   |               |                      |           |                          |          |                |                      |                        |                   |                      |                |                |                |                |
| TOTAL MANAGEMENT SOLUTIONS, INC.       | UNITED STATES                            | 4                                                  | 2                              | 5            | 2000                                 |                             | •              | •              | •      | •                  | •         |                  |                   |               |                      |           |                          |          |                |                      |                        |                   |                      |                |                |                |                |
| TVD ASSOCIATES                         | NJ                                       | 1                                                  | 6                              | 2013         |                                      |                             | •              | •              |        |                      | •         |                  |                   |               |                      |           |                          |          |                |                      |                        |                   |                      |                |                |                |                |
| VERTO SOLUTIONS                        | DC                                       | 35                                                 | 7                              | 2010         |                                      |                             | •              | •              |        |                    | •         |                  |                   |               |                      |           |                          |          |                |                      |                        |                   |                      |                |                |                |                |
| VIRTUAL, INC.                          | MA                                       | 220                                                | 4                              | 98           | 1999                                 |                             | •              | •              |        |                    | •         |                  |                   |               |                      |           |                          |          |                |                      |                        |                   |                      |                |                |                |                |
| WJ WEISER & ASSOCIATES, INC.           | IL                                       | 52                                                 | 73                             | 1988         |                                      |                             | •              | •              |        |                    | •         |                  |                   |               |                      |           |                          |          |                |                      |                        |                   |                      |                |                |                |                |

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CMI empowers our clients to consistently exceed revenue goals and achieve growth through our strategic insight, financial acumen, logistical expertise, and in-depth knowledge of the industry. Founded more than 40 years ago, CMI is among an elite group of association management companies that has maintained continuous AMC Institute accreditation since 2011.

INDUSTRIES SERVED: HEALTHCARE, HEALTHCARE-MEDICINE.

AMC INSTITUTE ACCREDITED AMC

ALTA MANAGEMENT SERVICES, INC.
1617 JOHN F. KENNEDY BLVD., #810
PHILADELPHIA, PA 19103
ED GROSE, PRESIDENT & CEO
EGROSE@ALTAMSI.COM
WWW.ALTAMSI.COM

Alta Management Services, Inc., is an association management firm that provides full-service management to nonprofit trade associations. We have been in the association management business since 1996 and have a reputation for increasing profitability in associations through increased membership and participation in association programs and conferences.

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